



User Guide

SiteScape Forum

SiteScape WebWorkZone

This manual provides instructions to assist you in using SiteScape software quickly and productively.

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About this Manual

This chapter provides introductory information about using this manual.

In this Manual

This manual provides first-time users with information and instructions to get started using Forum quickly and effectively. Chapter 1 defines the different components of the Forum user interface, and Chapters 2, 3, and 4 begin with a list of tasks, including the definition and purpose of each task, followed by the steps you perform to complete the tasks.

This manual contains the following chapters:

- Learning about Forum

Information in Forum is organized according to a hierarchy of different working spaces. After you learn about the different parts of the hierarchy, you can choose where to look for information and where to add information, and you can specify the kind of information you want to see when you first log in.

- Getting Started

To begin using Forum, you register and log in. You can then navigate to find the information you want, add entries and replies, and receive e-mail about forums that interest you (if your manager has enabled this feature).

- Common User Tasks

Tasks that users perform regularly include searching for entries, viewing new entries, using bookmarks and tasks, scheduling and viewing appointments in calendars, and sharing Forum calendar information with Microsoft Outlook.

- Co-authoring a Document

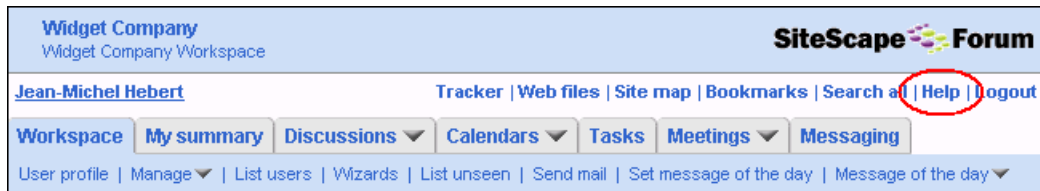
Members of a team can use Forum to work together on the creation of a document. After someone uploads the document into Forum, a teammate can download the document, edit it, and then upload the edited version. Forum can reserve the entry so that only one person can work on it at a time.

You can also use the document-review *workflow process*, which defines an orderly and predictable process through which an entry must pass, and a specific set of users who can work on that entry. You can track the work done on each entry at any time. The document-review workflow process allows public viewing of the document only after the teammates specify that it is ready.

You can find a glossary of terms at the end of the manual.

More Information

You can find more information in the SiteScape Help system. To access the Help system, click the **Help** link in the upper-right corner of the Forum page.



Help information appears in a separate browser window. You can find links to introductory information in the right frame of the Help window, at the end of the “Getting started” section. To view information about a specific part of Forum or WebWorkZone, click the links in the left frame.

You can also access Help information about a specific Forum page by clicking the **Help** button on that page.

Document Conventions

This manual employs the following conventions:

<i>What you see</i>	<i>What it means</i>
Click the Add toolbar item. Click the Getting Started link. Click Add Document . Click Close .	Toolbar items, links, menu items, and buttons are presented in bold font .
Type status, then click Enter . Open the UserGuide.pdf file.	Text that you must type and file names are presented in <code>Courier font</code> .
A <i>workspace</i> is...	New terms are presented in <i>italics</i> , and are defined in the Glossary.
See “Forums” on page 2 .	Cross-reference hyperlinks are underlined (and blue , if you are viewing this document in color).

Chapter 1: Learning about Forum

SiteScape Forum (Forum) is a collaboration tool that provides an effective way to communicate, collaborate, and share resources with different groups of people across the Internet. (In this manual, “Forum” refers to both Forum and WebWorkZone.) Forum enables you and other users to participate in a variety of online collaboration activities, such as:

- Collaborating with teammates and organizations across the Internet to achieve a goal
- Co-authoring a document
- Creating your own online team space to collaborate on a project
- Scheduling meetings
- Receiving e-mail updates about recent entries in a forum that interests you
- Generating reports based on data in a forum
- Setting up tasks and reminders for yourself or for other users

You can access SiteScape Forum in two ways:

- As SiteScape Forum, which is installed on your company server
- As WebWorkZone, which is the same product hosted on a SiteScape server

The functions and features of Forum and WebWorkZone are identical, and allow you to work within a small team, within an organization or company, across companies, or across the Internet. When you collaborate using SiteScape software, you bridge the gap between working alone at your computer and working together in meetings with your coworkers. Forum creates an online “virtual meeting space.” When you log in, you become part of the larger collaborative environment.

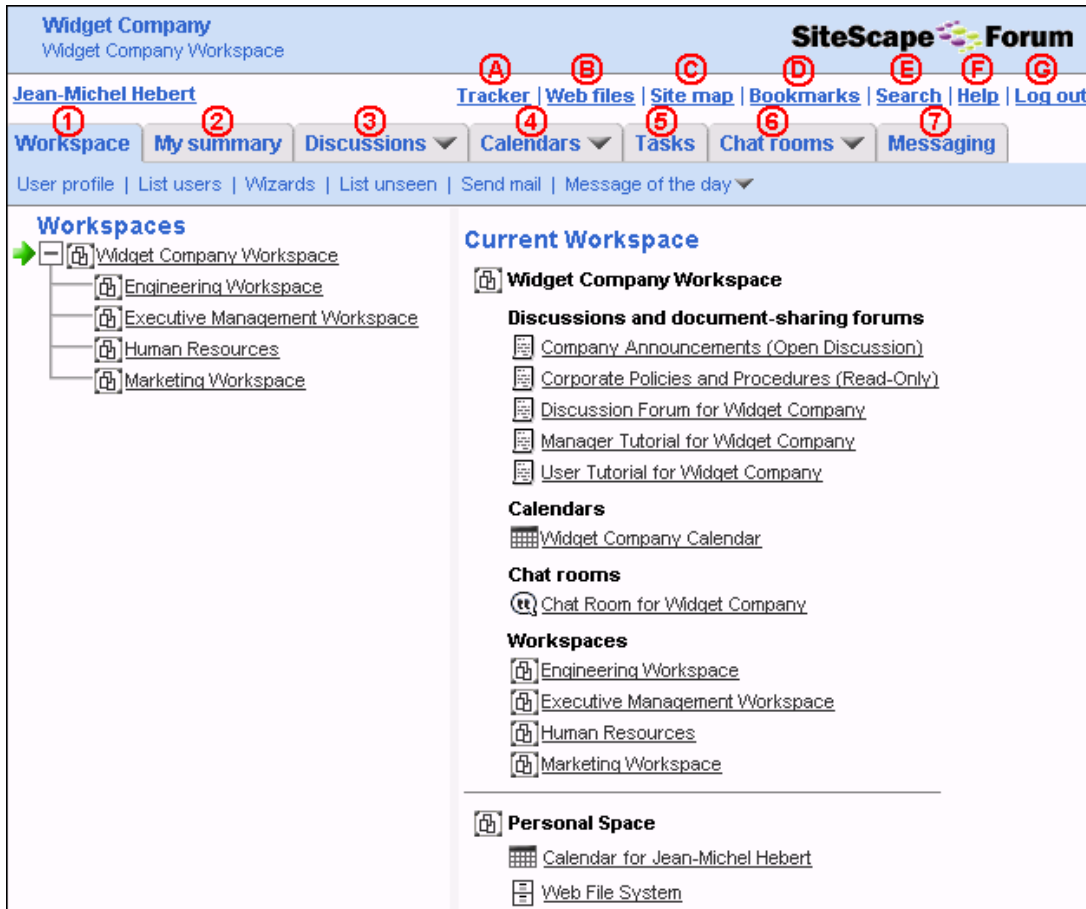
In addition to fostering an open exchange of ideas and information, Forum records the contributions of each user, creating an invaluable reference source of your company’s work. Through the search features, you can locate items quickly within this reference source.

In this Chapter

This chapter provides information on the following topics:

<i>Topic</i>	<i>Description</i>
Forums	Defines the types of forums available.
Zone-wide Tools	Describes the various tools and aids available to enhance your use of Forum.

The items in the following sections correspond to the numbers and letters in this picture of a workspace page.



Forums

Forums are applications that enable you to communicate and collaborate with your teammates and partners. Some forums are optional. For example, some companies never enable the “Chat rooms” forum because of company policy.

The following sections introduce the forum types. The numbers correspond to the numbers in the picture.

(1) Workspace

A *workspace* is a collection of navigation pages and forums that members of a group can use to work toward a common goal. Workspaces are like online office spaces. Just as the Engineering Department and the Sales Department may be located on separate floors of an office building, your zone may have an engineering workspace primarily for engineers and a sales workspace primarily for salespeople. The workspace page displays links to all of the forums (such as discussions and calendars) that are available to a user in that workspace.

A user may be allowed access to more than one workspace. If this is the case, he or she can see links to additional workspaces on the left side of the workspace page. Users without access permission do not see these links. For information about the complete list of workspaces and forums available in your organization, contact your workspace manager.

For more information about the workspace page, see [page 10](#).

(2) My summary

The “My summary” page provides a concise display of summary information about your workspace and about forums that are important to you. You configure the “My summary” page according to your preferences. For more information, see [page 17](#).

(3) Discussions

Discussions include threaded discussion topics, documents, URLs, and surveys. Threaded discussion topics are posted notes and replies to the notes. Discussion forums provide a dynamic, synergistic working space in which you can combine information (files, plans, documents, URLs) with discussions about that information (replies and surveys).

When a discussion thread is finished, Forum contains a snapshot of the information exchange. A new member of the team can review discussion entries to understand the way that documents were developed, the logic behind decisions, and other important historical information about a project.

For more information about using discussions, see [page 11](#).

(4) Calendars

Calendars provide a mechanism for tracking appointments. Workspace calendars are available to all of the users in a workspace, and users may be able to create personal calendars (if the zone manager has enabled this feature). You can share appointments between your Forum calendar and your Microsoft Outlook calendar by exporting and importing entries from one calendar to the other. For more information about using calendars, see [page 28](#).

(5) Tasks

Tasks provide an automated way to keep track of your work. You can assign tasks and reminders to yourself or to other users. You can also attach a task to a discussion entry, so that the entry can provide documents or replies that assist in the completion of the task. Forum can notify assignees by e-mail when a task is assigned, almost due, or overdue. For more information about using tasks, see [page 26](#).

(6) Chat Rooms and Meetings

Chat rooms allow synchronous collaboration in the form of chat sessions, in which a large number of people can participate at the same time. The chat session displays comments in the order in which they are submitted, forming a stream of conversation. When the conversation is finished, the manager can mark the chat session as *inactive*. The transcript of the conversation is then available.

Forum eMeeting enables you to host web conferences from within the context of Forum. Forum eMeeting includes capabilities for live application sharing, whiteboarding with markup, audio conferencing, web tours, instant feedback, and more. (This feature is optional and must be purchased separately from SiteScape. It may not be available on your installation.) For more information about Forum eMeeting, see the online User Help system.

(7) Messaging

Messaging allows you to have a private chat with another registered user. The messaging window is similar to a chat session, but it is designed for shorter, one-on-one conversations (transcripts are not saved).

Zone-wide Tools

The zone-wide tools, located above the toolbar and tabs, are available in all workspaces and forums. They are more general-purpose than the forum-specific items located on the toolbar.

The following sections introduce the zone-wide tools. The letters correspond to the letters in the picture on [page 2](#).

(A) Tracker

Tracker allows you to track forums on other zones or other installations, and is provided primarily for users of Forum Version 5.1 or an earlier version.

(B) Web Files

Your Web File System is a personal file-storage area that you use to transfer files to another computer or to share files. The Web File System appears in a separate browser window.

You can use your Web File System to access your files no matter where you are. For example, you can upload files at work, download and work on the files at home, and then upload the modified files so you can retrieve them at work. In addition, you can create a “shared” folder in your Web File System from which other registered users can access and download files.

(C) Site Map

The site map lists the hierarchy of workspaces and forums that you are allowed to access in the zone.

(D) Bookmarks

Bookmarks allow you to keep track of entries that interest you so that you can return to them easily in the future. For more information about bookmarks, see [page 26](#).

(E) Search

Using the **Search** tool, you can look for entries by entering a string of text for Forum to search for. For more information, see [page 22](#).

(F) Help

This tool opens the online Help system in a separate browser window.

(G) Logout

This tool logs you out and then displays the Login page again. This feature is particularly useful for managers who may have two usernames for use in testing. The manager can log out of the non-administrative user account and then log back in using the administrative username.

Chapter 2: Getting Started

This chapter provides instructions for these common tasks:

<i>Task</i>	<i>Description</i>
Register and Log in	To become an active participant in discussion forums, you must register with a username and password.
View a Workspace	When you view a workspace, you can see what it contains and decide if you want to view any of its items.
Navigate the Workspace	Navigate to find discussions, documents, and other users quickly.
View a Discussion Forum	The online discussion forum is the primary application for collaborating and sharing various types of information.
Add a Topic	Adding a topic in a discussion forum is one way to begin the collaborative process.
Add a Reply with an Attached Document	You can reply to topics entered by other users. You can attach files to discussion topics, replies, and other types of entries.
Delete an Entry	You may change your mind after creating an entry, or you may want to delete an older entry.
Enable E-mail Notifications	You can keep track of recent activity in discussion forums by receiving automatic e-mail updates.
Set Preferences for the “My summary” Page	You can view a concise summary of recent activity in the resources (forums, calendars, chat rooms, and so on) that interest you most. When you log in, this summary can help you choose which information to view first.

Register and Log in

Registered users can view and participate in Forum. The zone manager may also allow anonymous access, but managers typically allow anonymous users only to read information, not to create new entries.

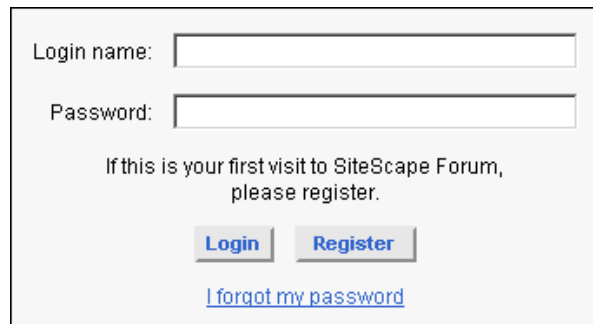
Even if anonymous access is permitted, SiteScape recommends that you register a username and password when you start using Forum. Some Forum features do not function properly for anonymous users. For example, you need to register a username before Forum can track the entries that you have not yet seen. In addition, if multiple users log in anonymously, Forum may not always display the expected page or settings.

Your company may require you to contact a manager to register, or you may be able to register yourself.

To register:

- 1 Enter the URL for accessing SiteScape Forum in the address box of the browser window. (If you do not know this URL, contact your Forum manager.)

The login box appears.

A screenshot of a web form for logging in or registering on SiteScape Forum. The form has a light gray background and a thin black border. It contains two input fields: 'Login name:' and 'Password:'. Below these fields is a message: 'If this is your first visit to SiteScape Forum, please register.' At the bottom of the form are two buttons: 'Login' and 'Register', both with blue text on a light gray background. Below the buttons is a blue hyperlink that reads 'I forgot my password'.

- 2 Click **Register**.

The registration form appears.

Register a new user SiteScape Forum

Please fill in the required information to register.

OK Cancel

Basic profile information

First name ⓘ
 *You must fill in at least one of the name fields (maximum 64 characters).

Middle name

Last name

Login name* ⓘ
 Examples (maximum 32 characters): JoeSmith, Sally1985

Password*
 Examples: ACTS12345, aHandyPhrase, BBV456

Verify password*

Organization

E-mail address
 Example: flincoln@acme.com

*Required fields.

Show Forum preferences ⓘ

Show additional profile info ⓘ

OK Cancel

- 3 Enter your first and last name. Forum will apply your name as the signature to entries that you create.
- 4 In the “Login name” box, enter a name. Your username can contain alphanumeric characters (a-z, A-Z, 0-9), dashes, and underscores, but no spaces. Names cannot include dashes as the first character in the name. An example of an acceptable name is:

jean

Usernames are case-sensitive. Whenever you log in, you must specify the same upper- and lowercase letters that you specify here. Forum also does not allow duplicate names that differ only by case. For example, if a user “Peter” already exists, you cannot register the name “peter.”

- 5 Enter a password, then enter it again to verify it. Passwords are also case-sensitive.

- 6 Enter your e-mail address.

The e-mail address is optional, but some features do not work without your e-mail address.

- 7 The remaining items are optional. Complete as many of them as you choose.

The **Show Forum preferences** button allows you to change the way that Forum appears to you. You can set the date and time formats, specify your time zone, choose a color theme, and more. The **Show additional profile info** button allows you to provide more information about yourself, such as your phone number, a picture, and a personal file such as a resume.

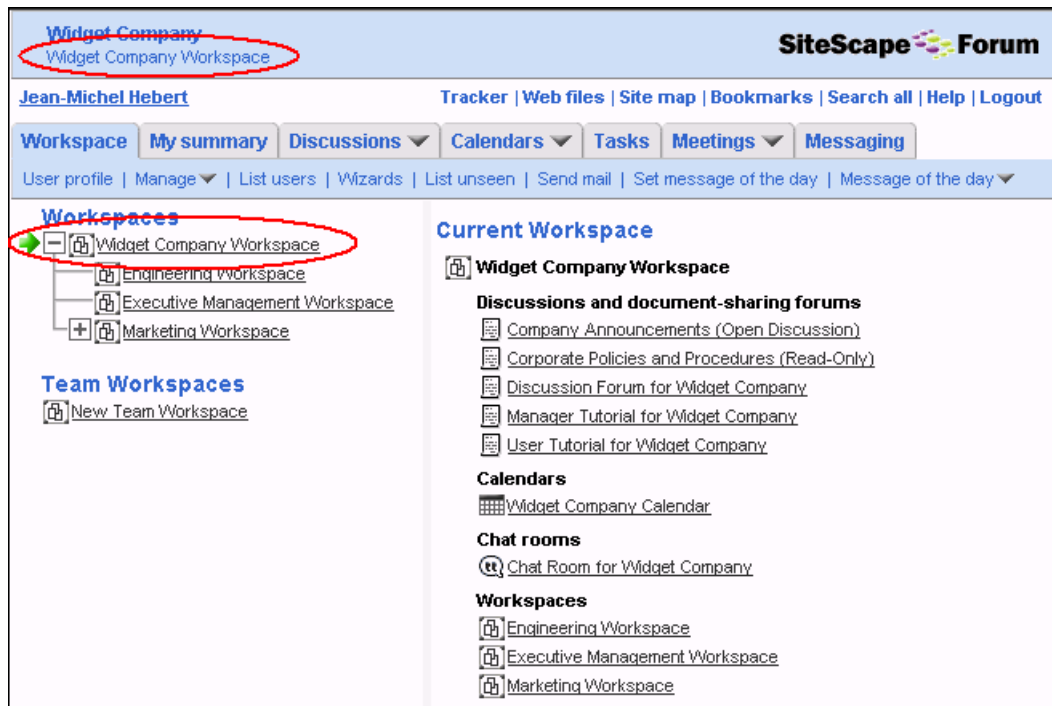
- 8 Click **OK**.

Remember your username and password so that you can use them the next time you log in.

View a Workspace

In Forum and WebWorkZone, the top-level workspace is called the *zone workspace*. This is the workspace that is common and accessible to everyone in your organization. If your manager creates additional workspaces, you may be able to access more than one workspace.

After you log in to Forum, the workspace page appears. A typical workspace page looks like this (your manager may have customized the workspace to look different).



You can locate the name of the current workspace in two places on the workspace page: in the upper-left corner, and in the Workspaces list, marked by a green arrow.

Navigate the Workspace

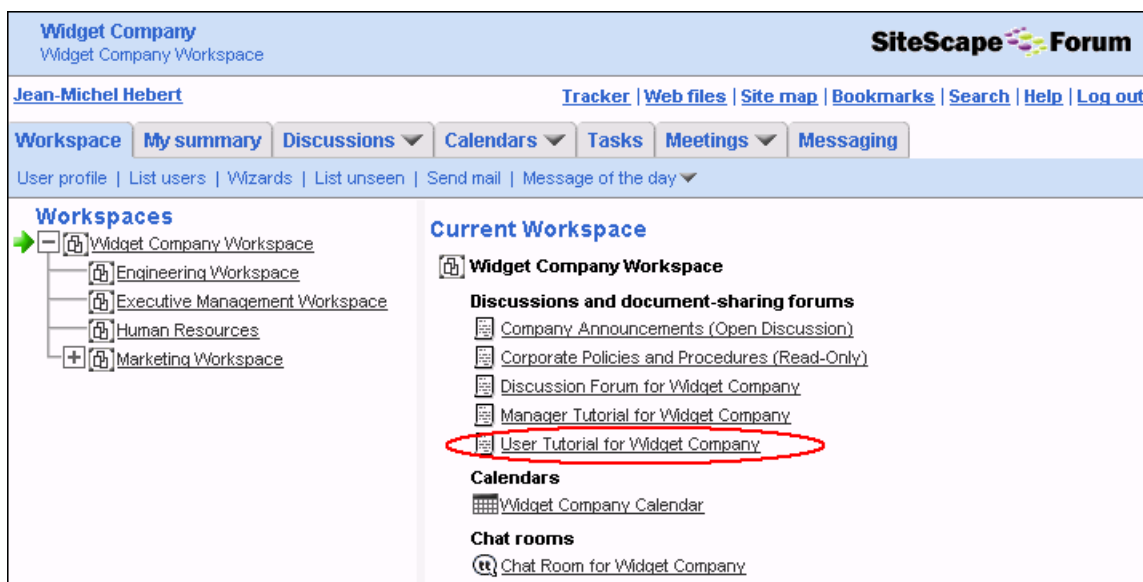
When you click the Workspace tab in the top-left section of the page, the current workspace page appears. The hierarchy of workspaces and subordinate workspaces appears in the Workspaces list on the left side of the page. The hierarchy is very similar to that of a standard file-access software program. To view a workspace, click its title.

A workspace can have a plus sign (+) next to it, indicating that it has at least one subordinate workspace. Click the plus sign to view subordinate workspaces, or click the minus sign (-) to hide them.

The right side of the workspace page displays a list of all the forums that you can access in that workspace. The Widget Company Workspace has several discussion forums, one calendar forum, and one chat forum.

View a Discussion Forum

You view a discussion forum by clicking its name on the right side of the workspace page. (You can also click the Discussions tab, then click the name of a discussion.)



The discussion forum that you chose appears, displaying a list of entries (discussion topics, replies, documents, and more).

The screenshot shows the SiteScape Forum interface for Widget Company. At the top, there's a header with the company name and the forum title. Below that, a navigation bar includes links like Tracker, Web files, Site map, Bookmarks, Search, Help, and Log out. A secondary bar has tabs for Workspace, My summary, Discussions (selected), Calendars, Tasks, Meetings, and Messaging. Below this is a toolbar with options like Add, Modify/delete, Tools, Next unseen, List unseen, and Search. A section titled 'User Tutorial for Widget Company' contains a welcome message and instructions. Below the tutorial, there's a 'User filters' section with a 'None' button. The main part of the interface is a table listing discussion topics.

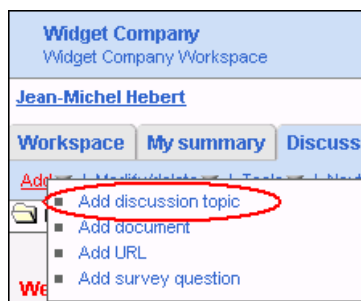
Unseen	Number	Type	Task	Title	Replies	Author	Activity date
	8.	📄		Helpful hints about discussion forums	(3)	Administrator	02/27/04 05:02 PM
	7.	?		Example Survey: Do you like the default colors?	(4)	Administrator	02/27/04 05:00 PM
	6.	URL		Example URL	(1)	Administrator	02/18/04 10:01 AM
	5.	📄		Example document	(3)	Administrator	02/27/04 04:54 PM
	4.	📄		Example discussion topic	(4)	Administrator	02/18/04 11:08 AM
	3.	📄		Learning about SiteScape Forum	(6)	Administrator	02/27/04 04:06 PM
	2.	📄		Please click here to sign in		Administrator	02/17/04 11:14 AM
	1.	📄		Introduction to this discussion	(3)	Administrator	02/17/04 11:06 AM

In a discussion, information is organized in folders. Folders can contain subfolders, which in turn can contain subfolders, and so on. To view the list of entries in a subfolder, click the subfolder name. To view an entry, click its title in the list.

Add a Topic

To add a topic:

- 1 In the discussion forum, view the list of entries.
- 2 Click the **Add** toolbar item on the left side of the toolbar.
A drop-down menu appears, displaying the possible entry types.



- 3 Click **Add discussion topic**.
The “Add a discussion topic” form appears.

4 Complete the form.

In Internet Explorer, you can use the HTML editor to format your text (in other browsers, you can use the regular text editor). For example:

[Add a discussion topic to User Tutorial for Widget Company](#)

Title

Text
 Style Font Size
B *I* U [List Icons] [Text Color Icon] [Background Color Icon] [Link Icon]
 Use the tools in this HTML editor to emphasize text by using **bold**, *italics*, or underscores.
 You can change the font style, SIZE, and color, and you can add [links](#).
 You can center text, or
 change the indent level in some other way, and you can add lists:
 1. Item one
 2. Item two
 • Item one
 • Item two
☐ View HTML [Stop using the HTML editor](#) [Check spelling](#) ▼
[Editing options...](#)

Keywords (separated by commas)

☐ **Allow other members to modify this entry** (This overrides the default access controls set by the administrator.)
☐ **Send me e-mail whenever anyone replies to this entry.**

Attach a file

☐ **Attach more files** (a prompt will appear after you click OK)

You can copy and paste Microsoft Word and Excel files directly into the HTML editor. Files retain their formatting. To enter HTML directly, click the “View HTML” checkbox at the bottom of the text box, and make sure that you use closing tags such as:

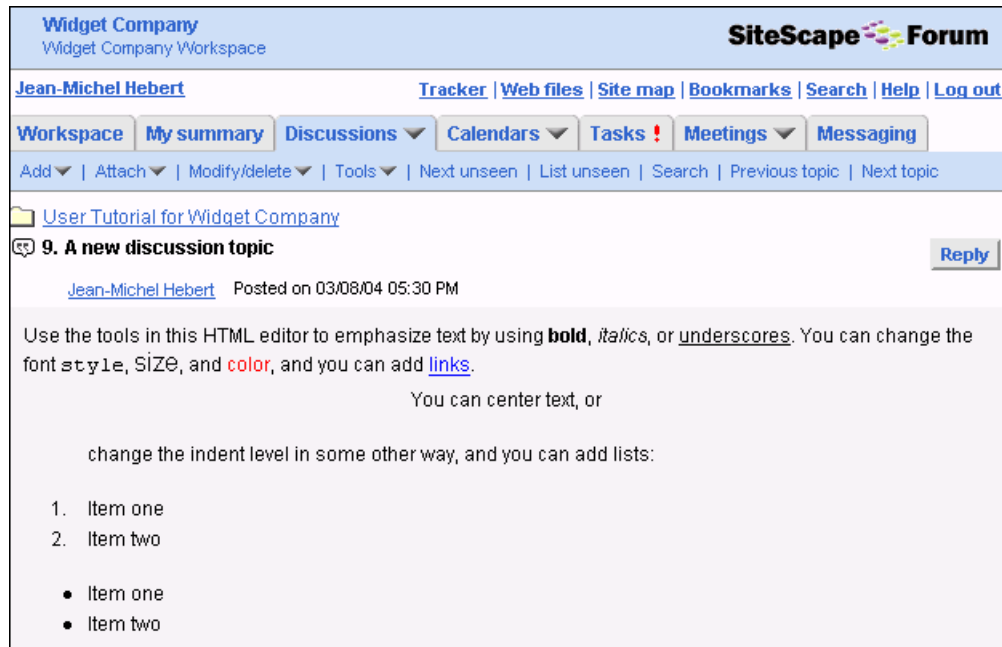
```
</p>
</li>
</ol>
```

Otherwise, you may encounter display problems when you view the entry in the discussion forum.

The HTML editor does not support scripts.

5 Click **OK**.

The entry you created appears.



This view is what other users see when they click the title of your entry in the list of entries.

Add a Reply with an Attached Document

After reading an entry in a discussion forum, you may decide to add a response. You can attach files to several kinds of entries; in this example, you attach one to a reply.

To add a reply to a discussion-forum entry:

- 1 In the discussion forum, click a title that interests you in the list of entries.

The entry appears.

- 2 To the far right of the entry title, click the **Reply** button.

The “Add reply to...” form appears. It is similar to the form for adding a topic.

- 3 In the “Title” text box, specify a descriptive title for the reply.

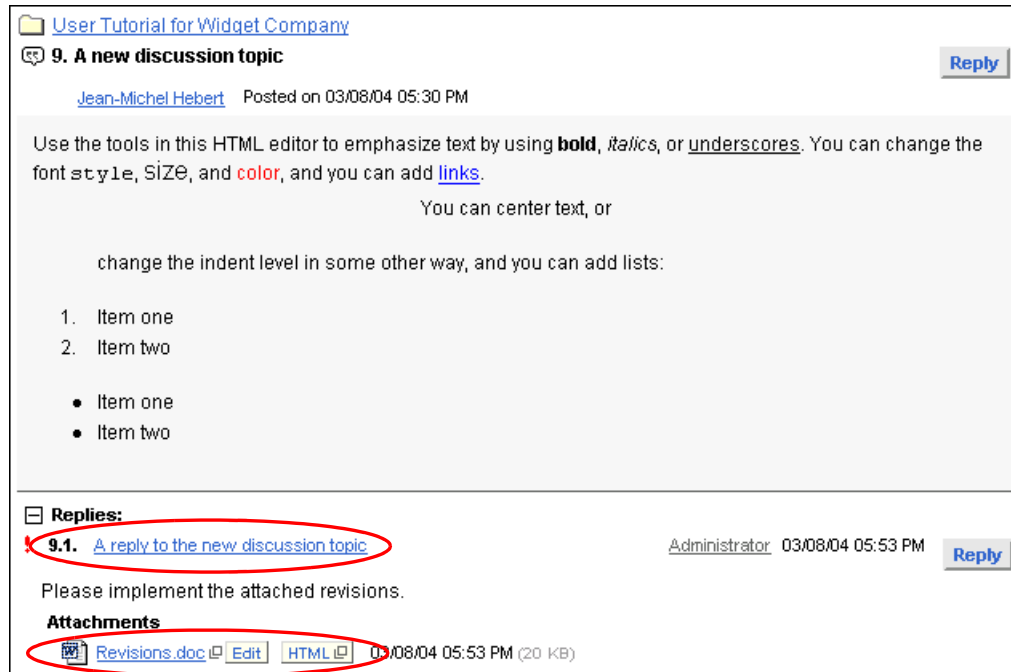
- 4 Enter the text of the reply in the “Text” box.

You do not need to enter your name, because Forum automatically includes a signature line. The signature line includes the full name you gave when you registered, and the date and time that you entered the reply.

- 5 Next to the **Attach a file** box, use the **Browse** button to locate a file on your computer.

6 Click **OK**.

The title that you provided now appears in the list of replies to the discussion topic. A link to the attached file also appears.



In addition to placing a response at the end of the list of replies, you can place your response in the middle of the list by replying to another reply. To do this, view the reply to which you want to respond, then click **Reply** to the far right of its title. After you enter your reply, it appears below the reply you were responding to.

Delete an Entry

You can delete only those entries that you created (or you must have management privileges to delete entries). This section describes how to delete a discussion topic. The process for deleting other entries (documents, surveys, URLs) is the same.

To delete a discussion topic:

- 1 View the discussion topic.
- 2 Click the **Modify/delete** toolbar item.
A menu appears.
- 3 On the menu, choose **Delete**.

The “Delete items from...” page appears, displaying a list of folders and entries that you have access to delete.

- 4 Click the title of the discussion topic you want to delete.

You can select multiple items by Ctrl+clicking the titles of the entries you want to delete.

Note: *Ctrl+click is a method used on Windows systems for selecting multiple items in a list. If you are not using Windows, use the method supported by your system.*

- 5 Click **OK**.

A confirmation form appears, explaining that this action cannot be reversed. (There is no “Undo” button.)

- 6 Click **OK** on the confirmation form.

The topic you selected has been deleted.

Enable E-mail Notifications

The e-mail notifications feature is one of several methods that you can use to keep track of new or modified information. If the discussion-forum manager has enabled e-mail notifications, you can receive e-mail updates about recent activity (new or modified entries) in that discussion forum.

Note: *To receive e-mail notifications, make sure that your registration information includes your e-mail address.*

A forum manager can include your username or group name in a distribution list, so that you receive automatic e-mail notifications for that forum. If you are not on a distribution list, but the feature is enabled for a discussion, you can set your own e-mail notifications by doing the following:

- 1 View the discussion forum.
- 2 Click the **Tools** toolbar item.
- 3 In the menu, click **Set notification**.

The “Notification for...” page appears.

- 4 Click one of the following radio buttons:

- Use Forum Default E-mail Notification

Receive e-mail notifications about activity in this discussion forum only if your manager specifies your name or your group name in the discussion's distribution list.

- Disable E-Mail Notification

If you click this checkbox, you do not receive notifications under any circumstances.

- Enable E-Mail Notification (Digest Style)

Receive one e-mail message with summaries of all activity in the discussion forum since the last time you received an update.

- Enable E-Mail Notification (Individual Message Style)

Receive an e-mail message for every new or modified entry. The e-mail notification also includes any files attached to the forum entry.

5 Click **OK**.

Your e-mail notifications are set for this forum.

E-mail notifications are sent out according to the schedule set by the discussion-forum manager. The e-mail messages contain links to new or modified entries. When you click one of these links, the entry appears in your browser window.

Set Preferences for the “My summary” Page

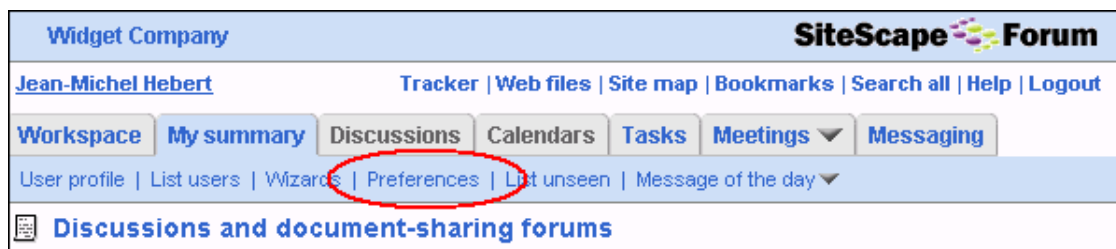
The “My summary” page provides another way to keep track of information by displaying a concise summary of activity in the forums that interest you most. “My summary” can display a count of new or modified discussion entries, entries from one or more calendars, all scheduled chat sessions and meetings for the day, tasks assigned to you, and more.

This feature is especially useful if your zone includes a large number of forums.

Because the “My summary” page is designed to track only the forums that are important to you and your work, you need to set your preferences before you can use the page.

To access the User Preferences page:

- 1 Click the “My summary” tab.
- 2 Click **Preferences** in the toolbar.



The User Preferences form appears, displaying the items that are available for display on the “My summary” page.

3 Complete the form.

The first checkbox sets the “My summary” page as the first page you see every time you log in to Forum.

In the remaining sections, clicking the first checkbox allows items in that section to appear on the “My summary” page. Clearing the checkbox prevents them from appearing. Select individual discussion forums, calendars, and meetings.

User preferences
[Return to the Widget Company Workspace](#)

☒ **Show the Summary page as the default zone home page**

☒ **Show the selected discussion forums on the summary page**
Clearing the box at left disables the display of all forums.
[Select all](#) [Clear all](#) **Warning:** if you select all forums, the summary page may be slow to load.

Engineering Workspace

- ☒ Engineering Discussion Forum
- ☒ Help Desk

Executive Management Workspace

- ☐ Manager Tutorial

Human Resources

- ☐ Company Policies and Procedures (Read-Only)
- ☐ Resume Tracker

Marketing Workspace

- ☐ Advertisement Initiatives
- ☐ Public Relations

Widget Company Workspace

- ☒ Company Announcements (Open Discussion)
- ☒ Discussion Forum for Widget Company
- ☐ User Tutorial for Widget Company

☒ **Show today's calendar events from selected calendars**
Clearing the box at left disables the display of all calendars.
[Select all](#) [Clear all](#) **Warning:** if you select all calendars, the summary page may be slow to load.

Engineering Workspace

- ☐ Engineering Calendar

Widget Company Workspace

- ☒ Widget Company Calendar

Personal Calendar

- ☐ Calendar for Jean-Michel Hebert

☒ **Show the Tasks summary**

☒ **Show the meeting summary for the selected meetings and chat rooms**
Clearing the box at left disables the display of all meetings and chat rooms.
[Select all](#) [Clear all](#) **Warning:** if you select all meetings and chat rooms, the summary page may be slow to load.

Meeting Servers

- ☒ Forum eMeeting meetings

Widget Company Workspace

- ☐ Chat Room for Widget Company

☐ **Show the Messaging summary**

4 Click **OK**.

The “My summary” page appears, showing the items you specified.

Widget Company Widget Company Workspace		SiteScape Forum	
Jean-Michel Hebert		Tracker Web files Site map Bookmarks Search Help Log out	
Workspace My summary Discussions ▼ Calendars ▼ Tasks ! Meetings ▼ Messaging		User profile List users Wizards Preferences List unseen Send mail Message of the day ▼	
Discussions and document-sharing forums			
New entries	Forum name		
0	Company Announcements (Open Discussion)		
3	Discussion Forum for Widget Company		
1	Engineering Discussion Forum		
0	Help Desk		
Calendar: 23 Mar 2004 Today This week This month			
When	Description	Where	Calendar
All day	CEO returns from Europe		Widget Company Calendar
Tasks			
	Task	Forum	Due date
!	Consolidate information on Project X for presentation to Sales	Tasks	03/23/04
!	Complete draft of Document Y.	Tasks	03/24/04
Forum eMeeting meetings			
Time	Meeting	Description	
01:00 PM	Weekly Team Meeting		

You can change your preferences for the “My summary” page at any time.

Chapter 3: Common User Tasks

This chapter describes how to perform these additional common tasks:

<i>Task</i>	<i>Description</i>
Search for an Entry	You may want to locate discussion topics, replies, or documents that contain a specific word. For example, a search for <code>coffee</code> would result in a list of all topics, replies, and documents that contain the word <code>coffee</code> .
View New or Modified Entries	Discussion forums provide icons and toolbar items to allow you to view <i>unseen</i> (new or modified) entries. You can view them one at a time, or you can view a list of unseen entries.
Bookmark Entries	Bookmarks allow you to keep track of discussion-forum entries that interest you, so that you can return to them easily in the future.
Assign Tasks	The Tasks page allows you to assign tasks and set reminders to help you and others keep track of work.
Work with Calendars	Use calendars, both private and shared, to track events and appointments.
Modify Your User Profile	You may need to update your personal information, or you may want to change the color theme that you see in Forum.

Search for an Entry

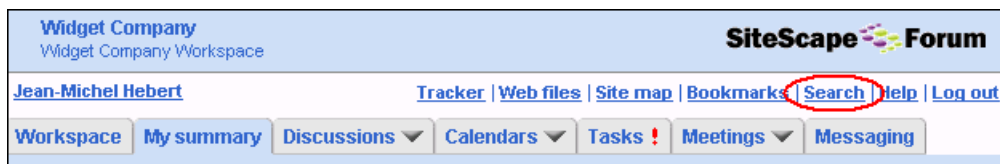
You can use the search feature to find discussion topics, replies, or documents that contain a specific word or words. In addition to searching for entries, Forum also searches the contents of files (such as Microsoft Word or PDF files) that users upload into forums.

You can search across all forums or in a single forum.

Search All Forums

To search for an entry across all forums in the workspace:

- 1 Click the **Search** tool located in the upper-right corner of the page.



The search page appears.

 A screenshot of the 'SiteScape Forum Search Facility' dialog box. It features a 'Search text' label followed by a text input field and a link to '[Advanced Search Form...]'. Below the input field is a checkbox labeled 'This query uses advanced search operators: AND, OR, AND NOT, NEAR, () and *'. Underneath is a 'Sort by:' section with two radio buttons: 'Relevance' (which is selected) and 'Entry number'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

- 2 In the “Search text” box, enter a search string.

If you are new to searches, begin by typing words you are looking for, such as:

apple orange fruit juice

To search for an exact phrase, enclose the phrase in quotation marks:

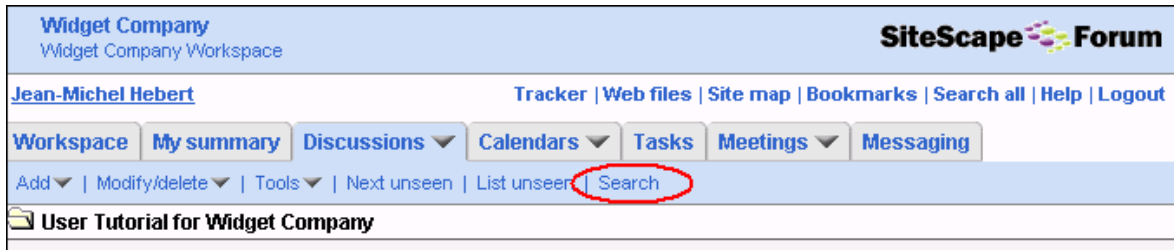
"orange juice"

- 3 Click **OK**.

The search results appear in the same window. To view an entry, click its title.

Search a Single Forum

To limit the search to a single discussion forum, view the forum and click **Search** in the toolbar.



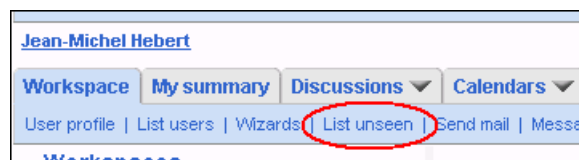
Forum searches only the current discussion.

View New or Modified Entries

Forum can display entries or replies that you have not yet seen (*unseen* entries). To view these unseen entries, use the **Next unseen** and **List unseen** toolbar items. In a discussion forum, **Next unseen** allows you to view individual unseen entries one at a time. **List unseen** allows you to track information in a single discussion forum, in all of the discussion forums you have access to in a workspace, or in all the discussion forums you have access to in a zone. When you use **List unseen** in a single discussion forum, you see a list of new or modified entries in that forum. When you use **List unseen** from the Workspace or “My summary” page, you see a count of new or modified entries in all of the available discussion forums.

Use List unseen

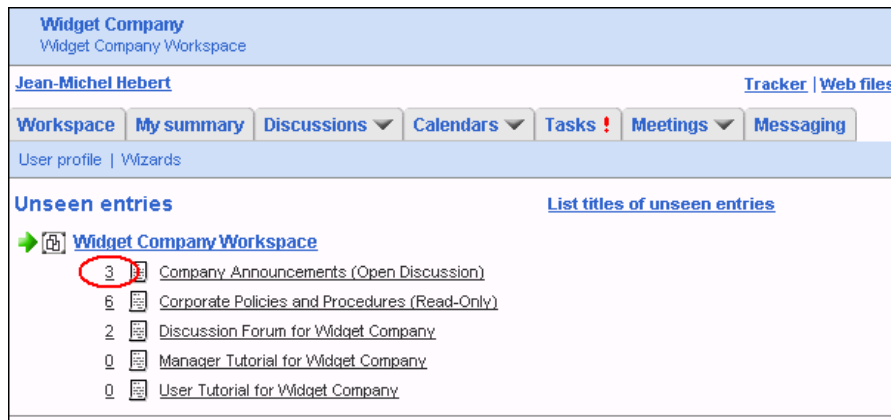
- 1 From the workspace page, click the **List unseen** toolbar item.



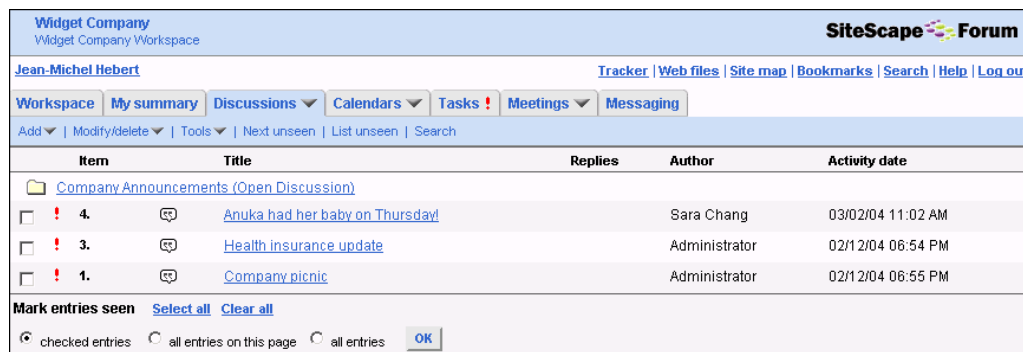
A summary of activity in all of the discussion forums you have access to in that workspace appears.

- 2 Review the count of new or modified entries in each of the discussion forums, and choose one to view.

To see a list of the new or modified entries in a discussion forum, click the number to the left of the forum title.



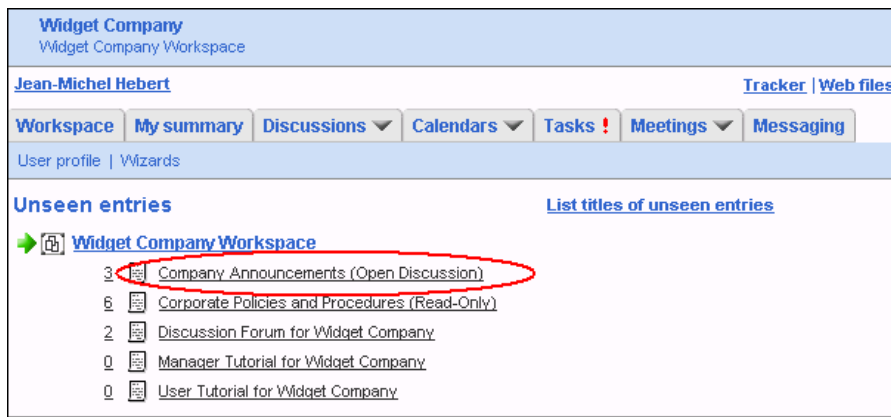
A list of that forum's unseen entries appears.



Click the title of an entry you want to see. Use **List unseen** in the toolbar to return to the list.

View Unseen Entries from the Summary List

As another option, to view unseen entries one at a time, without returning to the list. Instead of clicking a number in the summary list, click the title of a discussion forum.



The discussion forum appears. The red exclamation-point icon indicates that you have not yet seen an entry.

The screenshot shows the SiteScape Forum interface for 'Widget Company'. The user 'Jean-Michel Hebert' is logged in. The interface includes navigation tabs like 'Workspace', 'My summary', 'Discussions', 'Calendars', 'Tasks', 'Meetings', and 'Messaging'. A toolbar contains 'Add', 'Modify/delete', 'Tools', 'Next unseen', 'List unseen', and 'Search'. The main section is titled 'Company Announcements (Open Discussion)' and shows a list of entries. The first four entries have red exclamation-point icons in the 'Unseen' column, indicating they have not been viewed. The entries are: 'Anuka had her baby on Thursday', 'Health insurance update', 'Company vacation days', and 'Company picnic'. At the bottom, there is a 'View entry number' field with an 'OK' button and a 'Top of page' link.

Unseen	Number	Type	Task	Title	Replies	Author	Activity date
!	4.	CC		Anuka had her baby on Thursday		Sara Chang	03/02/04 11:02 AM
!	3.	CC		Health insurance update		Administrator	02/12/04 06:54 PM
!	2.	CC		Company vacation days		Administrator	02/12/04 06:53 PM
!	1.	CC		Company picnic		Administrator	02/12/04 06:55 PM

3 Do one of the following:

- Scan the left side of the list of entries for red exclamation-point icons. Click the title of an unseen entry that interests you. (After you view an entry or mark it as “seen,” the unseen icon disappears.)
- Click the **Next unseen** toolbar item. You can click this toolbar item to view the unseen entries one by one, from the oldest to the most recently created or modified.

Mark All Entries as Seen

If you have more unseen entries than you want to view, you can mark as “seen” all entries created before a specified date.

- 1 Enter the forum.
- 2 From the **Tools** menu, select **Set seen entries**.
- 3 On the “Mark entries...” page, mark all entries created before a specified date as “seen.” You can also choose to mark all of the entries.
- 4 Click **OK**.

The entries are now considered “seen.” From now on, Forum marks as unseen only those entries that are created or modified after the date you specified.

Bookmark Entries

After you add a bookmark, it is saved in the Bookmarks list. The next time you click the bookmark in the Bookmarks list, the bookmarked entry appears.

To add a bookmark:

- 1 Click the title of an entry you want to bookmark.
- 2 Click **Attach** in the toolbar.
- 3 In the menu, click **Attach bookmark**.

The Bookmark icon appears just below the entry title.

To view a bookmarked entry:

- 1 Click the **Bookmarks** tool, located in the upper-right corner of the page.
The Bookmarks page appears.
- 2 Click the title of a bookmarked entry.

The entry appears.

Assign Tasks

The Tasks feature helps you keep track of your work using two types of entries:

- Tasks

Tasks are activities that are assigned to users. Forum indicates when the task is started, almost due, completed, or overdue. Optionally, assigned users can receive e-mail to inform them of the creation and due date of the task.

- Reminders

Reminders provide documentation of events that users must remember. Forum sends e-mail notifications on or before the date of the event. You can remind yourself or others of deadlines, errands, meetings, and more.

Add a Task or Reminder

To add a task or reminder to the Tasks page:

- 1 Click the Tasks tab.
The Tasks page appears.
- 2 From the **Add** drop-down menu, select **Reminder** or **Task**.
The “Add a reminder” or “Add a task” form appears.

- 3 Complete the form by entering a title and description, a date or dates, usernames of people who will be assigned the task or sent the reminder, a priority level, and so on.

When assigning a task, you can choose to have Forum e-mail the assignees to notify them of their task.

- 4 Click **OK**.

The new task or reminder appears on the Tasks page. From this page, you can view, modify, and delete entries. If you are an assignee, you can view an entry to specify that you have completed the task.

Attach a Task or Reminder to a Discussion-Forum Entry

Sometimes a task or reminder may be directly related to an entry in a discussion forum. In this case, it is helpful to place the information in the discussion entry itself, so that people can view the task or reminder and the content of the entry at the same time.

To attach a task or reminder to a discussion-forum entry:

- 1 From the discussion forum, click the title of the entry to which you want to add a task or reminder.

The entry page appears.

- 2 From the **Attach** menu, select **Reminder** or **Task**.

The "Add a reminder" or "Add a task" form appears.

- 3 Enter the task or reminder information.

When you add a task to a discussion-forum entry, you can choose from two different attributes:

- **Private**

Only the task creator and the assignees can see the task.

- **Public**

By default, anyone who has the right to view the discussion forum can see the task.

By default, users can add both public and private tasks to discussion-forum entries.

However, managers can turn off access to this feature.

- 4 Click **OK**.

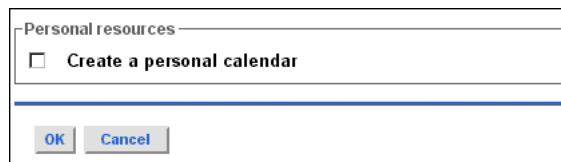
The entry page reappears, with the task or reminder information below the entry title.

Work with Calendars

This section provides information about using Forum calendars and sharing appointments with Microsoft Outlook.

View Your Personal Calendar

If your zone manager allows it, each user can have a personal calendar. When you register, you create a personal calendar by clicking a checkbox at the bottom of the **Show additional profile info** section of the registration form.



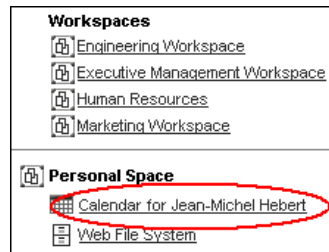
Personal resources

☐ Create a personal calendar

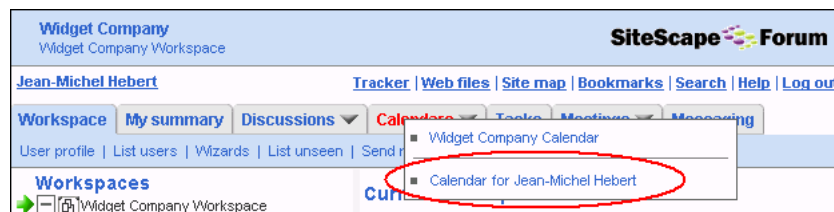
OK Cancel

If you have already registered, you can create a personal calendar by clicking the Calendars tab and choosing **Create a personal calendar**.

A link to your personal calendar appears in the Personal Space section in the bottom-right corner of the workspace page.



Another way to navigate to a calendar is by clicking the Calendars tab, then clicking the name of the calendar. Your personal calendar is the last item on the list.

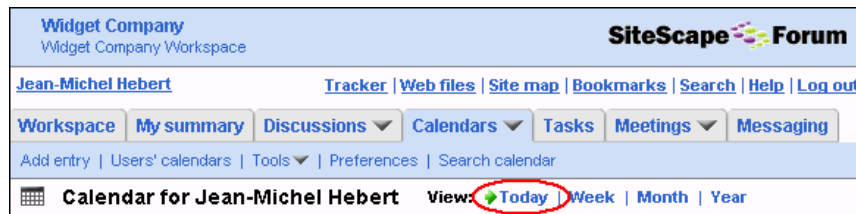


Other users can choose to view your personal calendar by clicking **Users' calendars** on the toolbar.

View Appointments for a Specific Day

To view appointments for a specific day:

- 1 Navigate to the calendar.
- 2 If you see a view of the week, month, or year, click **Today**.

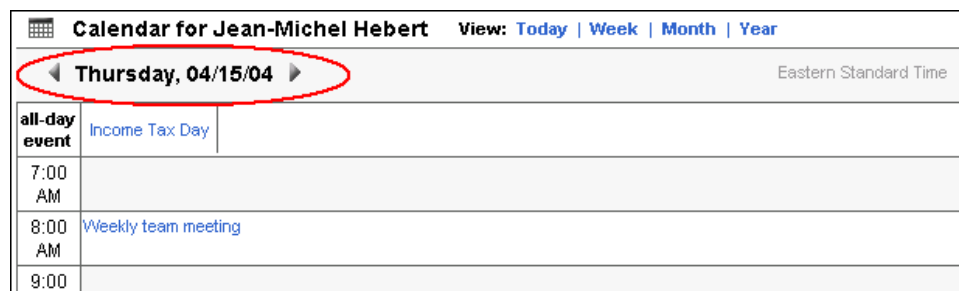


Appointments for the current day appear. You can now specify that you want to view the appointments for a different day.

- 3 In the lower-right corner of the page, enter the day, month, and year.
- 4 Click **Go**.

The screenshot shows a date selection form at the bottom of the page. It has three input fields labeled 'Day', 'Month', and 'Year', with values '15', '04', and '2004' respectively. A 'Go' button is located to the right of these fields. The entire form area is circled in red.

The appointments for the day you specified appear.



Schedule an Appointment

To schedule an appointment on a calendar, you must be the owner of the calendar owner or you must have permission to add calendar entries.

To schedule an appointment:

- 1 Navigate to the calendar.
- 2 Click the **Add entry** toolbar item.

The “Add a calendar entry” form appears.

Add a calendar entry [Submit entry](#) [Cancel](#) [Help](#)

Entry title, location, description

Entry title

Location

Description

Entry date & time

Date day: month: year: or choose date from popup calendars: [April](#) [May](#)

Start time hour: minutes: or click to set a time: [8AM](#) [9AM](#) [10AM](#) [11AM](#) [12PM](#) [1PM](#) [2PM](#) [3PM](#) [4PM](#) [5PM](#) [6PM](#) [7PM](#) [:00](#) [:15](#) [:30](#) [:45](#)

End time hour: minutes: or click to set a time: [8AM](#) [9AM](#) [10AM](#) [11AM](#) [12PM](#) [1PM](#) [2PM](#) [3PM](#) [4PM](#) [5PM](#) [6PM](#) [7PM](#) [:00](#) [:15](#) [:30](#) [:45](#)

OR [Set an all-day event](#)

[More options](#) ⓘ Repeat: This entry does not repeat

- 3 Enter a title for the appointment.

The location and description are optional.

- 4 Specify a date for the appointment. (The default entry date is the day you were viewing in the calendar.)
- 5 Specify a start time and an end time for the appointment.

To enter a time, you can use the drop-down menus or the links to the right of the menus. If the entry does not start at the beginning of the hour, use the links at the far right, which provide fifteen-minute increments. For an all-day event, click the **Set an all-day event** link. “All day” then appears in both the Start Time and End Time menus.

The remaining information on the form is optional.

- 6 Click **Submit Entry**.

The appointment is now scheduled.

Schedule a Repeating Appointment

To add a calendar appointment that repeats regularly, you can use the “Repeating entry” section of the “Add a calendar entry” form.

To add a repeating entry:

- 1 Access the “Add a calendar entry” form.

- 2 Specify a title, a start time, and an end time for the entry.

Optionally, you can enter a location and description.

- 3 Click the **More options** button.

The “Repeating entry” section appears below the **More options** button. You may need to scroll down to view it.

For repeating entries, you must specify both how often (Frequency) and for how long (Range) an entry is to repeat.

- 4 Specify the frequency.

You can specify a frequency of “every n days/weeks/months” (where “n” is a number you enter), and you can choose one or more specific days of the week or the month (every week on Wednesday and Friday, every month on the second Tuesday, and so on).

- 5 Optionally, in the Range section, specify the Start date of the entry.

- 6 Select one of the End date options:

- Specific end date

Use this option to specify the exact date on which the entry ends.

- No end date

Use this option if the entry you want the entry to recur indefinitely. You must specify a start date.

- Repeat count

Use this option to specify the exact number of times you want the entry to recur.

Initially, the calendar contains 10 occurrences of a repeating entry. You can specify a different number.

- 7 Optionally, choose one or more of the items in the Attachments section.

- 8 Click **Submit entry**.

The Calendar page reappears, displaying the new entry. To see the details, click the entry title.

Merge Calendars

It is common to use more than one calendar in Forum and WebWorkZone. As an option, you can set up one calendar to display entries from all of the calendars to which you have access. For example, your view of the corporate calendar (Widget Company Corporate Calendar) can include entries from other calendars (Engineering Department Calendar, Marketing Department Calendar, and so on). Or, you can merge the corporate calendar with your personal calendar so that you (and only you) can view entries from both at the same time. This section describes the second example.

To merge a workspace calendar with your personal calendar:

- 1 In the Calendars drop-down menu, click the **Calendar for [your name]** link to access your personal calendar.

Note: *To make sure that you are viewing your personal calendar and not the workspace calendar, check that the title of the calendar includes your name (for example, “Calendar for Sara Chang”). Otherwise, your personal appointments could appear in the workspace calendar.*

- 2 Click the **Tools** toolbar item.

- 3 Click **Administration**.

The “Calendar management” menu appears.

- 4 Click **Merge calendars (personal view)**.

The Merge Other Calendars form appears, displaying a list of all of the calendars that you are allowed to view.

- 5 In the select box, Ctrl+click the names of all of the calendars you want to merge with your personal calendar.

Note: *Ctrl+click is a method used on Windows systems for selecting multiple items in a list. If you are not using Windows, use the method supported by your system.*

- 6 Click **OK**.

- 7 Click **Close** to return to the calendar.

The specified calendars have been merged.

The **Hide merged entries** link in the lower-left corner of the Calendars page lets you choose which entries appear on your calendar. After you complete these steps, entries from all of the merged calendars appear. To return to viewing view only entries specific to your calendar, click **Hide merged entries**. The link then reads **Show merged entries**.

To remove the merged entries in a more permanent manner, return to the Merge Other Calendars form as above, and deselect the calendar that contains entries you want to remove from your personal calendar.

Import Entries from Microsoft Outlook

You can send an appointment from a Microsoft Outlook 2000 calendar to a Forum calendar. To do this, you first obtain the e-mail alias, and then import the entry.

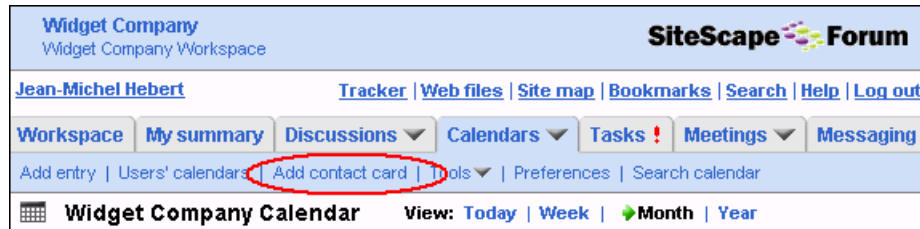
Note: *Forum supports importing and exporting with Outlook 2000 only. Importing and exporting may not work with previous versions of the Outlook product.*

Obtaining the E-Mail Alias

The alias is the e-mail address associated with the current Forum calendar. You need to provide this address so that Outlook can reach the Forum calendar.

To obtain the e-mail alias:

- 1 View the Forum calendar.
- 2 Click the **Add contact card** toolbar item.



If this item is missing, your calendar manager needs to configure the alias for this calendar.

The Contact window appears. The alias appears in the E-mail field.

- 3 Make a note of the alias so that you can use it later.
- 4 Click the “Send using plain text” checkbox.
- 5 Click **Save and Close**.

You can now e-mail entries from the Outlook 2000 calendar directly to the Forum calendar.

Importing the Entry

To import an appointment from Outlook:

- 1 View the Outlook calendar that contains the appointment you want to add to Forum.
- 2 Double-click the appointment.

If the appointment is a recurring one, the “Open Recurring Item” box appears. Select “Open the series,” and click **OK**.

The Appointment window appears.

- 3 From the **Actions** drop-down menu, select **Forward as iCalendar**.

An e-mail message window appears. The message contains the Outlook calendar appointment as an attachment.

- 4 In the “To...” text box, enter the Forum calendar e-mail alias that you obtained in the previous section.

Do not enter text in the body of the e-mail message.

- 5 Click Send.

Note: If you receive a Plain Text Recipient Warning alert, click Send Plain Text.

The appointment is now sent to the Forum calendar. It may take a few minutes to arrive.

Export Entries to Microsoft Outlook

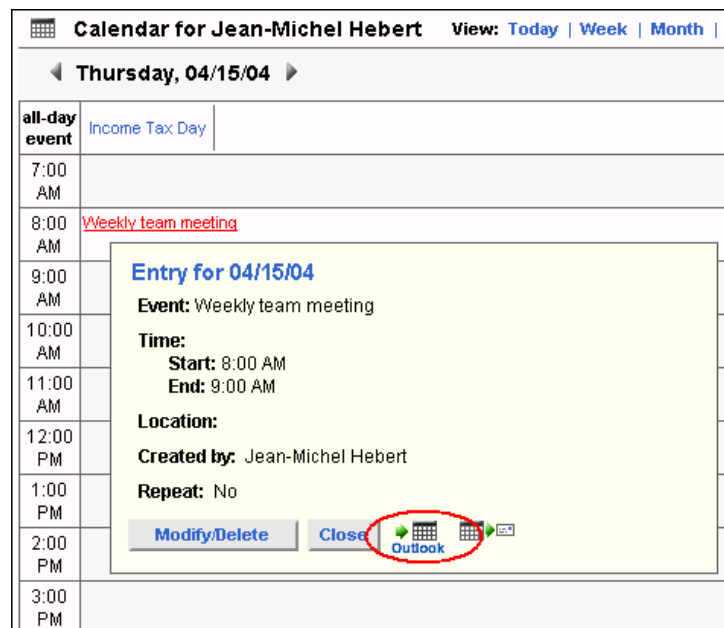
To export an appointment from a Forum calendar to a Microsoft Outlook 2000 calendar:

- 1 View the calendar that contains the appointment you want to add to Outlook.
- 2 Make sure that adding to Outlook is enabled by doing the following:
 - a Click the **Tools** toolbar item.
 - b Toward the bottom of the menu, look for the **Enable adding to Outlook** item.
 - c If the item appears on the menu, click it.

When the item reads **Disable adding to Outlook**, this feature is enabled.

- 3 Click the title of the appointment you want to add.

The entry appears in a popup window.



- 4 In the popup window, click the Outlook icon.
- 5 If the option to "Open it with the default application" appears, choose this option.
Forum opens Microsoft Outlook and displays the new appointment.
- 6 In the Outlook appointment window, click **Save and Close**.
The appointment is now in the Outlook calendar.

Modify Your User Profile

To keep your user profile information current:

- 1 On the workspace page, click the **User profile** toolbar item.

Your registration information appears.

- 2 Click the **Modify profile** toolbar item.

The “Modify user profile” form appears.

- 3 Make your changes to the form.

Examples:

- Change your personal information, such as your e-mail address or your password.
- Click **Show Forum preferences** and set your preferences for the time zone, date and time formats, color theme, and font size.
- Click **Show additional profile info** and upload a picture or a personal file, add an introduction, or create or delete a personal calendar.

- 4 Click **OK**.

Your user profile has been modified.

Chapter 4: Co-authoring a Document

SiteScape Forum allows you and your teammates to co-author a document efficiently. Forum provides automatic “locking” of files so that only one person can edit a document at a time. You and your teammates can also save different versions of a document as you edit it.

When co-authoring a document, you have several choices. This chapter discusses two of them:

- You can attach a file to a discussion topic and make it modifiable.
- You can use the prepackaged forum created especially for document review.

To use these methods, you perform the following tasks:

<i>Task</i>	<i>Description</i>
Co-author a Document	You can make a document available for review by other users who have access to the forum.
Modify the Attachment Using the Editing Applet	You can edit a document that has been attached to an entry, locking it, making modifications, saving it, and then uploading it.
Modify the Attachment Using Reserve/Release	If you cannot use the editing applet, you can reserve the entry, save the file to your computer, modify it, and then upload the edited document. When you release the entry, others can edit the document.
Co-author a Document Using the Document-Review Process	A preconfigured forum allows you to automatically keep a document private until the teammates finish reviewing it.
Apply the Document-Review Process to a Standard Entry	In the same forum, you can apply the document-review process to existing entries.

Co-author a Document

One way to share a document for co-authoring is to add it as an attachment to a discussion topic, and make the document modifiable by others. In this way, the document is centrally located and available for modification by those who have access.

To co-author a document:

- 1 In the discussion forum, add a discussion topic.
- 2 On the “Add a discussion topic” form, enter a title for the topic and add some text describing the co-authoring task.

The screenshot shows a web form titled "Add a discussion topic to Discussion Forum for Widget Company". It has a "Title" field with the text "Planning document for 2005". Below the title is a "Text" area with a rich text editor toolbar containing buttons for bold, italic, underline, bulleted list, numbered list, link, unlink, and text color. The text area contains the following text: "Joy, The attached document contains the sections for which I am responsible. Please add your sections. These plans must be complete by the end of the month. Thanks for your help."

- 3 Click the “Allow other members to modify this entry” checkbox.
- 4 Click the **Browse** button to locate the file on your computer, then click **OK**.

Note: If you do not see a place to attach a file, ask the forum manager to modify the forum access controls to allow users to add attachments.

The discussion topic appears, displaying the attachment. For co-authoring, you and your teammates can use the **Edit** button.

The screenshot shows the discussion topic "2. Planning document for 2005" by "Jean-Michel Hebert" posted on 03/02/04 02:15 PM. The text content is identical to the previous screenshot. Below the text is an "Attachments" section showing a file named "Project plan.doc" (20 KB) with a red circle highlighting the "Edit" button next to it. There is also a "Reply" button in the top right corner.

Modify the Attachment Using the Editing Applet

You can use the *editing applet* to modify the attached file. The editing applet automatically opens the file in the appropriate editor for the file (Microsoft Word, Excel, PowerPoint, and so on). The applet also “locks” the entry to prevent other users from editing the file while you are working on it.

To use the editing applet, you must have the Java Plug-in installed on your computer. Forum prompts you to install this software the first time you use the applet. The Plug-in is included in the SiteScape Forum product, so you do not have to download it from another source. After installing the Plug-in, you can use the Java-based features that Forum provides.

To modify an attached file:

- 1 Click the **Edit** button.
- 2 Edit the file in the editor, and save your changes.
- 3 Return to the browser window. The editing applet allows you to:
 - Save or discard your changes
 - Save previous versions
 - Unlock the entry
- 4 To save your changes, click the “Save changes to this file” radio button, then click **OK**. The editing applet uploads the revised file to the forum and unlocks the entry.

Notes:

- *Do not use the “Save as...” feature when you save the file in the editor. If you change the name of the file, the applet fails to save your changes.*
- *If you close the browser window or go to a different web page, you cannot upload the file, and you may lose any edits that you did not save in the editor.*

Modify the Attachment Using Reserve/Release

You may not be able to use the editing applet if:

- Your company policy does not allow you to install the Java Plug-in.
- You need to work with a document type that is not supported by the editing applet.

If you cannot use the editing applet, you can modify the attachment locally, manually reserving the entry to prevent other users from editing the file while you are working on it. Then, after you upload your edits, you can manually release the entry so that others can modify the file.


To modify the attachment locally:

- 1 View the entry that has the attachment.

- 2 Click **Modify/delete** in the toolbar, and choose **Reserve/release**.

A confirmation screen appears, displaying the name of the entry.

- 3 Click **OK**.

The entry page reappears, displaying the “Reserved entry” icon. 

This icon indicates that no one else can modify the document while you are editing it.

- 4 Right-click on the title of the attachment, and use **Save Target As...** to save the attachment to your computer.

***Note:** Right-clicking is the method for opening a context menu on Windows systems. If you are using a different platform, use the method that works for your system.*

- 5 Modify the source file on your computer.

For example, if the attachment is a Microsoft Word file, use Microsoft Word to edit the file on your computer, and then save your changes.

***Note:** Do not change the name of the file. If Forum saves the file under a new name, your teammates might not edit the correct document.*

The remaining steps describe how to upload the newly modified attachment.

- 6 View the entry that contains the attachment.
- 7 Click **Attach** in the toolbar, and choose **Attach files**.

The “Attach files” form appears.

- 8 Use the **Browse** button to locate the modified file on your computer.
- 9 To save the previous version of the attachment, make sure that the “Save any previous versions” checkbox is checked.
- 10 Click **OK** or click **Attach files**. (One of these buttons is present on the form, depending on the upload method you are using.)

The modified attachment is uploaded to the forum. You can now release the entry.

- 11 Click **Modify/delete** in the toolbar, and choose **Reserve/release**.

A confirmation screen appears, displaying the name of the entry.

- 12 Click **OK**.

Forum releases the entry, making the file available for other team members to modify. The “Reserved entry” icon no longer appears.

In some cases, you may be concerned about conducting a more private review process, to limit the number of users who can see the document as it is revised. In these cases, consider placing the document in a forum or a workspace with limited access, or use a workflow process (such as the document-review process described in the next section) for a finer level of access control.

Co-author a Document Using the Document-Review Process

The document-review workflow process allows you to specify the names of users who privately review a document. During the review, the entry is labeled “In review,” and only the designated reviewers can view the document. Other users cannot see the entry.

When all of the reviewers indicate that the review is ready, Forum automatically labels the entry “Public,” and other users can view the document. As another option, the user who created the entry (its “owner”) can interrupt the review and end it early. If this happens, the phrase “Owner made public” appears in the entry.

If you do not have a forum with the **Add review document** menu item, ask your manager to create a forum that includes the “Review process” customization.

To place a document in a private-review process and work with it to completion:

- 1 View a discussion forum that contains the review-process customization.
- 2 From the **Add** menu, click **Add review document**.

The “Add a new review document” form appears. (If you are not using Internet Explorer, the form may look slightly different from this picture.)

- 3 Enter a title for the entry and use the **Browse** button to locate the file on your computer.
- 4 Enter some descriptive text in the Text area.
- 5 Complete the rest of the form, then click **OK**.

The “Initializing the workflow process” form appears. Use this form to designate the users who can review the document.

- 6 In the “Enter a list of usernames...” text box, enter a search string to define a list of usernames from which you can select reviewers.

For example, if you know a username, type it. If you know that the username begins with the letter s, type:

s***

To see a list of all users in the zone (if you are sure that the list is manageably short), type:

*

- 7 Click the **OK** button to the right of the text box, toward the top of the page.

In the “Select the usernames to be added” area, a list of usernames that match the search string appears.

- 8 Ctrl+click to select the names of the reviewers.
- 9 Click **Add**.

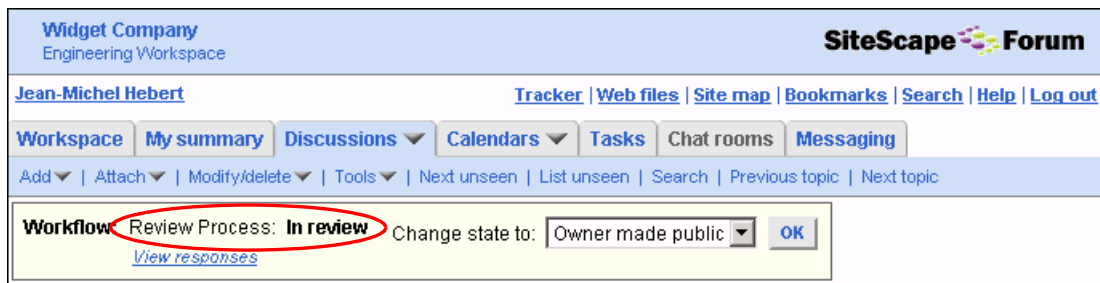
The usernames appear in the Selected Users list, to the right of the **Add** button.

- 10 Repeat the previous four steps until the Selected Users list contains the usernames of all of the reviewers.

If you mistakenly add someone whom you do not want to be a reviewer, click that person's name in the Selected Users list and then click **Remove**.

11 Click **OK**.

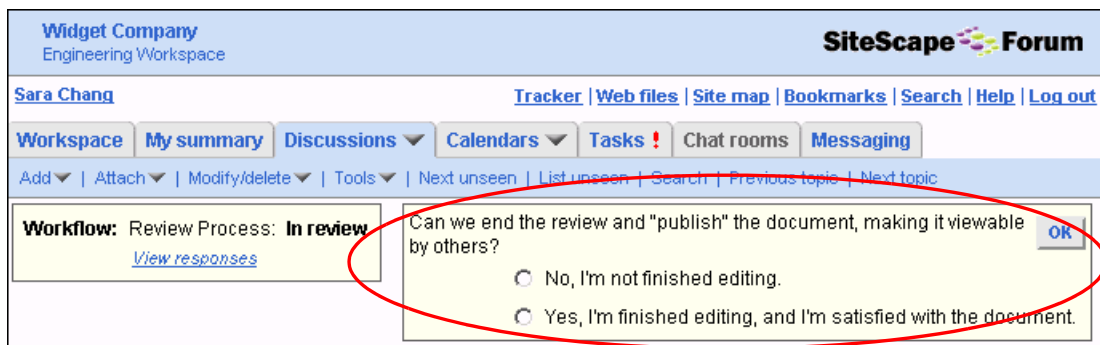
The document entry appears, displaying workflow information at the top of the page



On the left side of the page, the name of the current workflow state appears (“In review”). Only you (the entry creator) and the users that you specified can view this entry and its “In review” label. To other users, Forum appears to have skipped a number in the entry list.

The entry creator can also see a “Change state to” drop-down list. By choosing **Owner made public** and clicking **OK**, the entry creator can make the document public immediately, forcing an end to the review process. Otherwise, the reviewers continue with the next steps.

Instead of the “Change state to” drop-down list, reviewers see a question on the right side of the page.



During the review process, the reviewers and the entry creator can click the **View responses** link on the left side of the page to see how others have responded to this question.

12 Review, discuss, and edit the document.

13 Click a radio button to answer the question.

14 Click the **OK** button.

As soon as every reviewer answers Yes and clicks **OK**, Forum automatically moves the entry to the “Public” workflow state, so that other users can view and discuss the document. If one or more reviewers answer No or do not answer the question, Forum keeps the entry “In review.”

Apply the Document-Review Process to a Standard Entry

The review-process customization is, in part, a predefined workflow process. In the same forum described in the previous section (a forum that contains the document-review workflow process), you can apply the workflow to a standard entry, such as a topic, URL, or survey. To do so:

- 1 View the standard entry in the forum.
- 2 Click the **Tools** toolbar item.
- 3 Click the **Initiate a workflow process** menu item.
- 4 The “Initiate a Workflow Process for...” form appears.

If the **Initiate a workflow process** menu item is absent, your discussion-forum manager did not implement this customization. Ask him or her to export the Review Process workflow from a forum that has the document-review customization, and then import it into this discussion forum.

- 5 In the “Select the workflow...” section of the form, click the Review Process radio button, and then click **OK**.
- 6 The “Initializing the Workflow Process for...” form appears. Continue as described in the previous section.

If you have other repetitive business processes that are a part of your work (such as purchase-order approval, product defect reporting, time-off requests, and so on), ask your discussion-forum manager to define a workflow process that reflects your own unique business process. SiteScape can automate these repetitive tasks and send helpful e-mail reminders to people who are required to perform the next step in the task.

Glossary

bookmark

A tool that allows you to keep track of discussion-forum entries that interest you, so that you can return to them easily in the future.

chat room

A forum that contains *chat sessions* of a particular type. For example, an Engineering Workspace may have chat rooms for UI Design, Quality Review, and New Development. A Marketing Workspace may have chat rooms for PR, TV Advertisements, and Print Advertisements.

chat session

One synchronous discussion; that is, everyone participates at the same time. When people are chatting, the session is an active session. When the discussion is finished, the chat-forum manager can indicate that the session is now an inactive session. The software stores the transcripts of all chat sessions so you can refer to them in the future.

editing applet

A discussion-forum tool that allows you and your teammates to edit uploaded documents. The applet automatically “locks” the Forum entry, opens the file on your computer for you to edit, prompts you to save your changes, uploads your revised version, and unlocks the Forum entry. (The applet requires a Java Plug-in.)

entries

Units of information contained in a forum. Examples include discussion topics, replies, document entries, calendar appointments, and chat sessions.

entry creator

The person who created an entry.

entry owner

The person who is assigned ownership of an entry (initially, the entry creator).

forum

A virtual meeting place in which you communicate and collaborate with your teammates. Examples of forums include discussions, chat rooms, meetings, tasks, messaging, and calendars.

Forum eMeeting

An add-on web conferencing feature that includes capabilities for live application sharing, whiteboarding with markup, audio conferencing, web tours, instant feedback, and more.

forum manager

A person who performs the initial configuration of a forum and who has the right to perform management tasks (such as setting access or deleting entries) in that forum.

meeting

One of two kinds of synchronous communication supported by Forum: a *chat session* or a *Forum eMeeting web conference*.

personal space

Pages that contain information for your personal use, such as your personal calendar. You access your personal pages from the workspace page.

reminder

A type of entry in the Tasks forum that documents an appointment or event that you want to remember. Forum can send e-mail reminder messages on or before the date of the event.

search

A tool that allows you to search for an entry that contains specific text or that matches other criteria (a particular author, a creation or modification date, and more).

site map

A tool that displays a list of all of the forums and personal pages available to you in all of the workspaces in the zone.

summary pages

The workspace page and the “My summary” page. These pages provide a concise display of summary information about the workspaces and forums that are important to you.

synchronous communication

An online meeting or chat in which two or more people participate and communicate with one another at the same time over the Internet.

task

A type of entry in the Tasks forum that documents an activity assigned to a user. Forum records when the task is started, almost due, completed, or overdue. Forum can also send e-mail to assigned users to inform them about the creation or the due date of the task.

unseen entries

Entries that you have not yet read. These could be new entries or modified entries.

user profile

Information about yourself that you specify when you register. This information includes your name, e-mail address, group membership, a picture (optional), and more.

WebWorkZone

A hosted collaboration service that provides access to a SiteScape Forum zone.

web conferencing

An online meeting in which you can share the real-time view of your computer screen with others to demonstrate new software, give a web seminar, and hold a variety of other types of presentations over the Internet.

Web File System

A tool that allows you to transfer files across the web or to share files with your teammates. For example, at work, you can upload documents to your Web File System, and then access and edit them on your home computer.

wizards

Specially designed pages that provide step-by-step assistance in performing common management tasks, such as creating workspaces, creating groups, creating forums, and more.

workflow

A customization that enables forum managers to create discussion-forum entries that pass through various states in a work process. These entries automatically move through a well-defined, orderly process, guided by actions that specific users take on the entries. Examples of workflow processes are a purchase-order process, a document-review process, a customer service desk, and more.

workspace

A collection of summary pages and forums that one group uses to work toward a common goal. One person can be a member of more than one workspace. In this case, links to additional workspaces appear on the workspace page.

workspace manager

A person who can perform initial configuration of the workspace by creating discussions, calendars, and chat rooms, and then specifying who has access to these resources. By default, the workspace manager also has the right to perform management tasks in all forums in the workspace.

zone

All of the workspaces available to your organization and all of the registered users who can access one or more of those workspaces.

zone manager

In Forum, the person who performs the initial configuration, invites users to participate, and has the right to perform management tasks in all workspaces and forums.

In WebWorkZone, the person who signs up for a zone, performs the initial configuration, invites users to participate, and has the right to perform management tasks in all workspaces and forums.

zone-wide tools

Items that assist you in using SiteScape software regardless of the current workspace. The tools are located in the upper-right corner of the page and include Web files, Site map, Bookmarks, Search, Help, and Logout.

zone workspace

The first workspace you enter when you log in. This is the workspace that is usually accessible to all members of your organization.

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